WHAT’S NEW
in
ALEPH VERSION 22

March 16, 2015
# Table of Contents

<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Acquisitions/Serials</td>
<td>3</td>
</tr>
<tr>
<td>Acquisitions Updates:</td>
<td>3</td>
</tr>
<tr>
<td>Serials Updates:</td>
<td>5</td>
</tr>
<tr>
<td>Cataloging</td>
<td>7</td>
</tr>
<tr>
<td>Circulation</td>
<td>12</td>
</tr>
<tr>
<td>Course Reserves</td>
<td>16</td>
</tr>
<tr>
<td>Interlibrary Loan</td>
<td>16</td>
</tr>
<tr>
<td>Systems</td>
<td>20</td>
</tr>
<tr>
<td>Web OPAC</td>
<td>21</td>
</tr>
</tbody>
</table>
Acquisitions/Serials – Dee Nolan

Summary of Changes for Acquisitions

• New edi-12 service – Load EDI Invoice in Preview Mode
• Recalculate Price Information in the Order Form
• Order Change Alert Message

Summary of Changes for Serials

• Update Holding record based on Item Arrival

Acquisitions Updates:

Load EDI Invoice in Preview Mode – edi-12

A new batch service EDI Invoice Load – Preview (edi-12) is available. The purpose of the report is to allow libraries the opportunity to correct errors on their edi invoices before the actual edi invoice is run. Libraries run the edi-12 after the edi-09 and before the edi-10. The new edi-12 looks for INVOICE files and then performs a preview mode load, reporting any actions and errors that may occur during the actual updating of the database.

The new EDI Invoice Load – Preview (edi-12) is available under Services and EDI.
When running the edi-12, enter an Output file name

Example of the Preview Report

The report will list any errors that would occur when the invoice is loaded.

See Answer #3701 “EDI Invoicing with ALEPH and EBSCO” for complete step-by-step instructions on running an EDI invoice.

Recalculate Price Information in the Order Form

A new Calculate Price checkbox has been added to the Quantity and Price tab of the Order Form. Libraries can choose whether they want to recalculate the price information in an order when the Unit Price or Number of Units is updated.

If the Unit Price or Number of Units is changed, and you select the new Calculate Price checkbox and click Update or Refresh, the system will automatically recalculate the price information fields. If the Unit Price or Number of Units is changed and the Calculate Price checkbox is unchecked, the old price information remains in the order record.
New “Calculate Price” checkbox

Order Change Alert

An alert message is now displayed when you update an order and then move to another order without saving the changes.

Note: This message appears only when moving between orders within the orders list pane. When moving to the left pane or any other area that is not the orders list, the message does not appear.

Serials Updates:

Update Holding record based on Item Arrival

LIBRARIES NEED TO CONTACT PALS IF THEY WISH TO USE THIS NEW FUNCTION

It is possible to have the holding record 86X fields automatically updated when registering linked item arrivals in serials.
In order for this to function properly, 85x/85xX patterns must reside in the holding record and items must be linked to the holding record.

Also, if the library has an 866 in the holding record with the same $8 value as the new items or a subfield $8 with zero(0) value, no automatic update will occur.

Libraries that wish to use this functionality will need to contact the PALS office. The PALS office will set up tab_z105 message triggers with the following:

```
UPDATE-ENUM n SYS60
```

After arriving issues, Aleph automatically built the 863 and 866 into the holding record.
**Cataloging** – Alex Kent

Summary of Changes

- Applying MARC field 264 when field 260 is missing
- Link to RDA Toolkit
- Extending Number of Columns for Print-08 Output Report
- File-90 (Advanced Generic Loader) Enhanced to Create Multiple Items for one Bib
- Updating Holding records based on item arrival
- URI in Authority Records

**Applying MARC 264 field when 260 is missing**

The new MARC 21 264 field is now integrated within the current fix routines.

- The following fix routines are enhanced to consult and update 264$c if 260$c is missing:
  - Fix_doc_tag_008
  - Fix_doc_tag_008_heb
  - Fix_doc_008_han_1
  - Fix_doc_punctuation_usm

In Version 22, there was a bug with these routines. The 264 to be used in positions 7-10 on 008 field was not ranked.

In Minor Release, this has been corrected.

- When multiple 264 fields exist, they are ranked based on the second indicator in the following order: 1,0,3,2.
- Field 264 with second indicator other than 1,0,3,2 is ignored.

**Link to RDA Toolkit**

A new “Show RDA Toolkit” option has been added to allow access to the RDA toolkit for subscribers.

Select tag in record, then go to Edit Actions and click on “Show RDA Toolkit” to bring up corresponding RDA rule.
**Maximum # of columns for print_08 increased to 10**

There are now 10 available columns for the p_print_08 output report.

**File-90 Loader enhanced to create multiple items for one bib**

File-90 has been enhanced to support ability to create multiple items for one BIB. The number of items that are created is set in field 980$$g$$

File-90 loader can create multiple items from each loaded file. The number of items is taken from the input file 980$$g$$

Tab_loader defines the policy for the loaded record. When the item creation method (column 4 in tab_loader) is set to 2 or 3, the file-90 loader creates new items as defined in 980$$g$$

Only the first 980$$g$$ is taken into account. If there is no 980$$g$$, a single item is created based on the 049$$a$$ location code.
Moving records in Cataloging

When items are moved from one BIB/ADM record to another, the item history (Z3OH records) is moved to the new item, including the “DELETE” transaction just created by the moving. This has two consequences: the same item appears as both existing and deleted, and an item can appear as deleted more than once.

This has been corrected: now the history transaction of type DELETE remains under the old item key.

Split Mode Cataloging

In split mode cataloging, the cursor is not always correctly positioned. When moving between records using keyboard shortcuts (Ctrl+2 and Ctrl+Shift+2) the cursor is repositioned to the top of the record instead of remaining where it had been positioned.

This has been corrected.

Item History list

The item history list, especially All Items History, can get very long. When looking for a particular item change, staff scrolls through the list, sometimes waiting for multiple chunks of data to load, to find the line they are interested in. If they then need to jump back to the Items List, and return to Item History, the screen automatically reloads back to the top, and they must find the change again.

The Item History List saves the last line the user stood on so if the user navigates to someplace else in the application and then moves back to the list, the focus remains on the last line the user stood on.

Corrections to MARC tag information

Information about 041, 505, 655 and 751 MARC tags has been corrected.
**Correct heading: sub-field order will be based on new tab100 flag**

A new flag, TAB100-CORRECT-HEADING-ORDER, has been added. The flag supported values are

- 1 – correct heading of existing subfields remains the original subfields order
- 0 – New or modified subfields are added to the beginning of the field.
- The default value is ‘1’.
- Solution: Now, when a subfield is changed, there are two options for the order of the subfields.

**URI in Authority Records**

Note: This has not been implemented. It requires a lot of setup with minimal impact. Contact PALS if you think this should be implemented.

It was always possible to activate Links in the authority record when opening record in the authority library. It was not possible to activate the URI link when looking at the "Authority Record" in a bib browse index. This was because the edit_doc_999_aut_<library>.lng table did not provide linking options. This is now corrected, and it is possible to activate URI link from the Authority Record view in BIB browse list.

The following example was provided by Ex Libris.

URLs can be defined in fields other than field 856. Subfield $u$ (URI) can also be defined for the following fields:

**In bibliographic records:**
- 505 (Formatted Contents Note)
- 506 (Restrictions on Access Note)
- 514 (Data Quality Note)
- 520 (Summary, Etc.)
- 530 (Additional Physical Form Available Note)
- 540 (Terms Governing the Use and Reproduction Note)
- 545 (Biographical or Historical Data)
- 552 (Entity and Attribute Information Note)
- 555 (Cumulative Index/Finding Aids Note)
- 563 (Binding Information)
- 583 (Action Note)

**In authority records:**
- 670 (Source Data Found)
- 678 (Biographical or historical data)

**Setting:**

**Authority library:**

edit_doc_999.eng:

```plaintext
## 670##    D    Source Data Found    Y M    E
## 856##    D    External Link    Y M    E
```
edit_field.eng:
1 # 670## D
2                        u A

tab_buf_z403:

############################ get_buf_z403_bib 856##,,u,*,,D,
############################ get_buf_z403_bib 670##,,u,*,,D,
############################ get_buf_z403_media VIEW

Bib library:

edit_doc_999_aut_usm10.eng:
## 670## u              D LURI                  Y M     E
## 856##                D LElectr. Resource  Y M     E

Example:

Web OPAC:

Ex Libris University – Browse an Alphabetical Index

Type word or phrase: van gogh

Select index to browse: Author

Browse List: Authors

<table>
<thead>
<tr>
<th>No. of Recs</th>
<th>Brief Recs</th>
<th>Entry</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Van Gogh Museum, Amsterdam – [LC Authority Record] See: Gunstera, Herman R, van</td>
<td>Van Gunstera, Herman R, van</td>
</tr>
<tr>
<td>1</td>
<td>Van Harlingen, Katherina</td>
<td></td>
</tr>
</tbody>
</table>
Circulation – Susan Dueis

Summary of Changes

- All Overdue Items and Debt Amount Now Included in Overdue Notices
- Additional Overdue Items Message
- Hold Request Related Events Now Recorded in Circulation Log
- New Go to Patron Button
- New Go to Item Button
- Two Patron Name Fields (First Name and Last Name)
- New Batch Service Hold Shelf Reminder Letters (cir-38)
- Infrastructure for Paying Patron Debts via OPAC

All Overdue Items and Debt Amount Now Included in Overdue Notices

The following options have been added to the Overdue and Lost Billing Summary Letter (cir-51) service, in response to an enhancement request:

- Include all overdue items
- Include debt amount
The first option, “Include All Overdue Items”, will result in items showing on the overdue notice BEFORE they are scheduled to, according to tab 32. However, if an item has exhausted its notices (according to tab 32), it will not appear on the overdue letters, even if this option is chosen. This is not quite what the enhancement was asking for, so this may have limited usefulness.

The second option, “Include Debt Amount”, will result in the overdue letter including a total of accrued overdue fines that the patron owes, currently. Because the fines are accruing, this amount may change by the time the item is returned.

Dear Sir/Madam,

The following item(s) is/are overdue:

<table>
<thead>
<tr>
<th>Bib Info</th>
<th>Loan Date</th>
<th>Loan Hour</th>
<th>Due Date</th>
<th>Due Time</th>
<th>Requested?</th>
<th>Recalled?</th>
<th>Notice No.</th>
<th>Fine</th>
<th>Daily Fine</th>
<th>Hourly Fine</th>
<th>Balance</th>
<th>Accrued fine</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hadot, Pierre: The inner citadel</td>
<td>07/15/2014</td>
<td>08:49 AM</td>
<td>08/14/2014</td>
<td>00:00 AM</td>
<td>Not requested</td>
<td>Not recalled</td>
<td>3</td>
<td></td>
<td></td>
<td></td>
<td>-180.00</td>
<td>0.00</td>
</tr>
</tbody>
</table>

These two parameters will be defaulted to “N” in job list runs of the cir-51 service. If you’d like to change those parameters in your cir-51 service that is set up in the job list, notify the PALS office. To implement the “Include Debt Amount”, your letters may need to be customized. Contact the PALS office for help, if needed.

To test this new functionality, you may wish to run your cir-51 service with Update Database set to “N”. Then you can see the letters produced and make modifications before finally running the service with Update Database set to “Y”.

13
Additional Overdue Items Message

A new message that indicates if the patron has overdue items has been added to the lower pane of the Return page in the Circulation module.

If the patron has overdue items, the message **Patron has additional overdue item/s** is displayed. If the patron does not have any overdue items, the message **No overdue items for patron** is displayed.

![Image of Doc Number (Item Sequence) 7513638 1.0 Material Type: Book Item Sublibrary: Saint Paul College Library Item Status: Book Item Collection: Horizons Books Item Call No.: 973.932 MAR Item Call No. 2: Item Description: Process Status: In process Holds on Shelf: No holds on the shelf Items on Shelf: No items on shelf Overdue Item(s): Patron has additional overdue item/s]

Hold Request Related Events Now Recorded in Circulation Log

The following hold request related events will now be recorded in the circulation log:

- Hold request created
- Hold request created (OPAC)
- Hold request deleted
- Hold request deleted (OPAC)
- Hold request placed on shelf
- Hold request filled letter printed
- Hold request not filled letter printed
- Hold request picked up

The cir-78 service has also been modified, to allow scrubbing of the hold events from the circulation log.

New Go to Patron Button

The List of Items page in the Circulation module has been enhanced to include the Go to Patron button that opens the Loans pane of the Patron tab.

The Go to Patron button becomes active only for items that are currently on loan. If item is not on loan, the new button is grayed-out (inactive).
Clicking the Go to Patron button opens the Loans pane of the Patron tab, which lists all of the patrons’ active loans.

**New Go to Item Button**

The Circulation Log List in the Circulation module has been enhanced to include the Go to Item button that opens the Circulation Items List.

The Go to Item button is enabled only for log lines referring to an existing item.

Clicking the Go to Item button opens the Circulation Items List, which lists complete item details.

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**Two Patron Name Fields (First Name and Last Name)**

**NOT IMPLEMENTED**

This enhancement divides the patron name field into two fields: First Name and Last Name. While there has been some desire to return to two patron name fields ever since that functionality disappeared in v.19, switching existing patron records back to two name fields is problematic and would involve manual correcting of non-standard names. Also, the PLIF process (to batch load patron records) would need to be re-written, as this enhancement is only supported by a newer version of the PLIF processing program than we use. With input from the MnPALS Consortium, it was decided to not implement this enhancement.

**New Batch Service Hold Shelf Reminder Letters (cir-38)**

A new batch service Hold Shelf Reminder Letters (cir-38) has been added. This service produces both letters to remind patrons regarding hold requests which are not yet picked up and a summary report. The service can be found in the Circulation module, under Services>Requests>Hold Shelf Reminder Letters (cir-38).
Infrastructure for Paying Patron Debts via OPAC
NOT IMPLEMENTED

Aleph has been enhanced to provide an infrastructure for paying patrons’ debts via the web OPAC. To implement this, libraries must have an external payment system (e.g. PayPal) and work with them to facilitate the exchange of information between the external payment system and Aleph. Because of our consortial arrangement, it could be difficult to implement this functionality for individual libraries.

Course Reserves – Carrie Curie

Save Course Information Default Values

- Allows a user to save information like Department, Instructor, Period, and course dates
- This feature has been added to save a staff member’s time, when entering courses at the beginning of a semester
- For more information, see the Support Center Video at https://pals.custhelp.com/app/answers/detail/a_id/3689

Interlibrary Loan – Sonja Eilertson

Summary of Changes

- Borrowing request- “Series” and “Publication Place” fields added
- Borrowing request- “Duplicate” a request
- Lending- Search “Requester Reference Number” improved
- Lending- “Check-in” when no item record found
**Borrowing request- “Series” and “Publication Place” fields added**

Two new fields “Series” and “Publication Place” have been added to the “Bibliographic Details” tab of a borrowing request. Staff can edit or add information to these fields. These fields are available for both copy and loan borrowing requests.

This information will display on the “Request Info” tab of the borrowing and lending request.

![Borrowing Request Diagram](image1)

![Lending Request Diagram](image2)
Borrowing request - “Duplicate” a request

A borrowing request can be duplicated to create a new request for the item. This may be helpful when requesting several volumes from a set or additional articles from a journal title. Highlight the request you want to make a copy of and click on “Duplicate”.

A pop-up box displays with some fields pre-populated. Staff will need to review and edit or add information to the request.

For copy requests make sure to check the box “Copyright Signed”. Make sure to check the “Need by Date” field.
**Lending- Search “Requester Reference Number” improved**

As a lending library staff can search lending requests by lending request number, title, ISBN and other searches. When some lending libraries used the “Requester Reference No.” (Borrowing request number) the search wouldn’t find any results even though there was a request with that borrowing number.

In version 22, the lending Search by “Requester Reference Number” gets results.

![Aleph Lending Search](image)

**Lending- “Check-in” when no item record found**

Occasionally a lending ILL unit will accidentally not “Ship” a request and when the item is returned to the lending library they are unable to do a “Check-in” and they get the error message “No Item found for this request.”

![Check-in Error](image)
In version 22, a lending ILL unit is allowed to do a “Check-in” on a request when no item record is found. A pop-up box will display and ask staff to confirm that they want to “Check-in” the request even though no item was connected to the request. The pop-box message asking for confirmation will display if the bulk “Check-in” or the “Check-in” on an individual request is used.

When lending ILL staff select “Yes” the request will update to Closed for borrowing and lending ILL units.

**Systems** – Dan Honetschlager

**Summary of Changes**

- **Secure SMTP Communication for E-mailing Notices/Letters**
- **Printing in Aleph Version 22 - New HTML Print**

**Secure SMTP Communication for E-mailing Notices/Letters**

The communication between Aleph and the SMTP server can now be done at a more secured level.

The following two options have been added:

- **TLS**
- **SSL**

Use these options according to the SMTP settings on your email server.

Configure secured communications in the AlephAdm module >Configuration >E-Mail Settings. It is also possible to configure this functionality in `Alephcom.ini` in the mail section:

The default is `SecureConnection=NONE`

**Printing in Aleph Version 22 - New HTML Print**

As part of ongoing infrastructure improvements and maintenance, the new HTMLPrint 9.02 has been integrated in the GUI. It replaces HTMLPrint 5.24, which is no longer supported by the vendor.

This results in the print preview, printing of reports and exporting to Excel in Aleph Version 22 to work a bit differently than in Version 21. We now recommend that you have Print Configuration set to “Browse HTML” for both the canned (default) reports and the custom reports (priv) made by the PALS office. The PALS office made the “Browse HTML” the default setting when we built the program for each institution.
Note: When printing with the new Browse HTML option, Aleph uses the IE print control and not the regular htmlprint software.

**Web OPAC** – Perry Madden

The majority of “new” functionality in the Aleph Web OPAC is behind the scenes and will not affect your searching experience.

There are a couple of new or updated features mentioned in the Aleph 22 Release Notes document that we will NOT be implementing at this time.

- A new RESTFUL API option is now available for creating an acquisition request via a discovery system. We will not be implementing this feature in MnPALS Plus at this time.

- It is now possible to create a new patron using a new RESTFUL API. However, we will not be implementing this feature in MnPALS Plus.

- Because of issues with our multiple ADM structure, PALS does not use the PDS functionality for allowing the patron to log into the Web OPAC by means other than the patron barcode at this time.

- One new feature we will implement in the near future into MnPALS Plus is the display of Item Due Time to go along with the Item Due Date. Hopefully, this will be implemented in MnPALS Plus when we move to the new version of VuFind sometime in May 2015.